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1982 Nielsen Report on . . .

TELEVISION

NIELSEN TELEVISION SERVICES

IN THE UNITED STATES . . .

Nielsen Television Index (NTI) provides continuing estimates of TV viewing and national sponsored network program audiences, including national ratings 52 weeks per year. Data regularly reported include persons audiences and household audiences by market sections, Daily Ratings, Fast National and Multi-Network Area Ratings, Cost/1000 Estimates and Program and Brand Cumulative Audiences. In addition, the National Audience Demographics Report provides estimates of audiences by persons categories within household demographics. NTI's on-line multiphase time-sharing computer systems offer clients direct access to a wide range of special analyses.

Nielsen Station Index (NSI) measures television station audiences in over 200 local markets, and provides season-to-season reports (up to seven per market per year), on viewing by time periods and programs. NSI measurements include metro area and Designated Market Area (DMA) ratings, station total audiences, program pre-emptions, cumulative audiences and "time viewed," and estimates of viewing over a wide range of demographic categories.

Nielsen Metered Market Service provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago, San Francisco, Philadelphia and Detroit (starting in Fall, 1982) via a sample of households with Audimeter® instruments linked directly to Nielsen computers.

Nielsen HomeVideo Index (NHI) provides measurement services for the cable television industry and related in-home video forms. This includes audience measurements for the cable satellite networks, local cable systems, pay-TV services and program suppliers.

IN CANADA . . .

Nielsen Broadcast Index (NBI) is the Canadian counterpart of the Nielsen Station Index in the United States. NBI measures television station audiences in the 41 DMA's that comprise the total Canadian national market. NBI report frequency varies from 3-18 weeks, depending on market size. Report book features include demographics, special vs. regular time period listings, trends, cumes, week-by-week ratings and metro area ratings for major reports.

Nielsen Television Index (NTI) publishes network television audience measurement reports for 37 weeks of the year. These reports cover all programs carried on Canadian networks: CBC, CTV, Global, Radio-Canada and TVA.

IN BELGIUM . . .

Diary measurement of national audiences two months per year.

IN ITALY . . .

National audience reports are provided monthly, nine times per year. They include data for the national networks, foreign stations and all local stations combined.

Three times per year, the local service reports on household and persons viewing activity for all major stations in 19 regions.

IN JAPAN . . .

Nielsen Station Index was established there in 1960, and produces Metered Market measurements for the Tokyo, Osaka and Nagoya areas and diary measurements for 7 other markets.

Additional copies of this brochure at no charge are available within U.S.A., Canada, U.K., Ireland, Mexico and Japan upon request to A.C. Nielsen Company, Nielsen Plaza, Northbrook, Illinois 60062, U.S.A. and within Continental Europe, South Africa, Brazil, Australia and New Zealand from A.C. Nielsen Management Services S. A., P.O. Box 516, CH-6002 Lucerne, Switzerland.

The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index and Nielsen Station Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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'82 NIELSEN TELEVISION

Historically, each year has brought remarkable new developments to the television industry. But never before in history has the industry witnessed the rate and dimension of change seen in the recent past; and this change promises to continue virtually unabated.

Both the traditional and new forms of television are commanding high audience interest as documented by the record viewing levels set during 1981. Millions of living rooms and family rooms across the country have been transformed into combined information, home services, and entertainment centers.

Since television and cablevision have become even more complex and competitive, it is imperative that the marketplace has full confidence in the audience estimates provided. We are grateful to you — our good clients and friends — for your continued expression of that confidence.

Highlights from the various reports and studies compiled by the Nielsen Media Research services are contained in this, our 27th issue of the Nielsen Report on Television. We hope you find it worthy of your review.

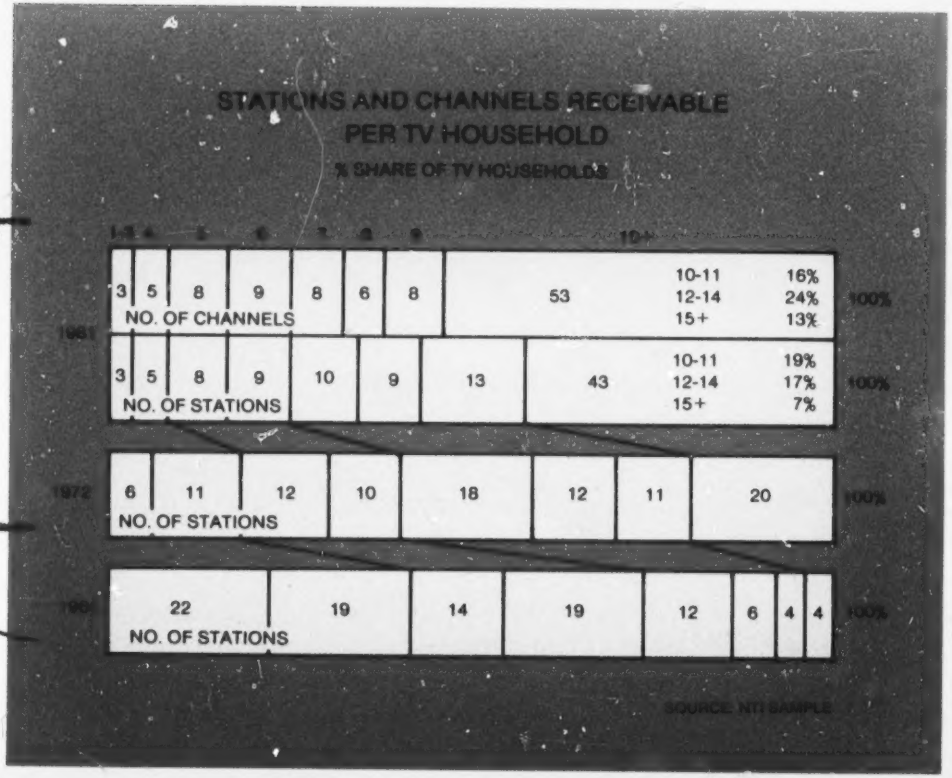
James D. Lyons
President
Media Research Group

Viewer has an increasing number of channel choices

According to the Federal Communications Commission, there were 1,045 stations on the air . . . 774 commercial and 271 public . . . as of January 1, 1982.

Nielsen Television Index reports that as of 1981, 43% of television households could receive the signals of 10 or more television stations; this compares to only 20% in 1972.

However, the share of television homes able to receive TV fare on 10 or more *channels* becomes 53%, when channels programmed by the cable-only services are added to "stations receivable."

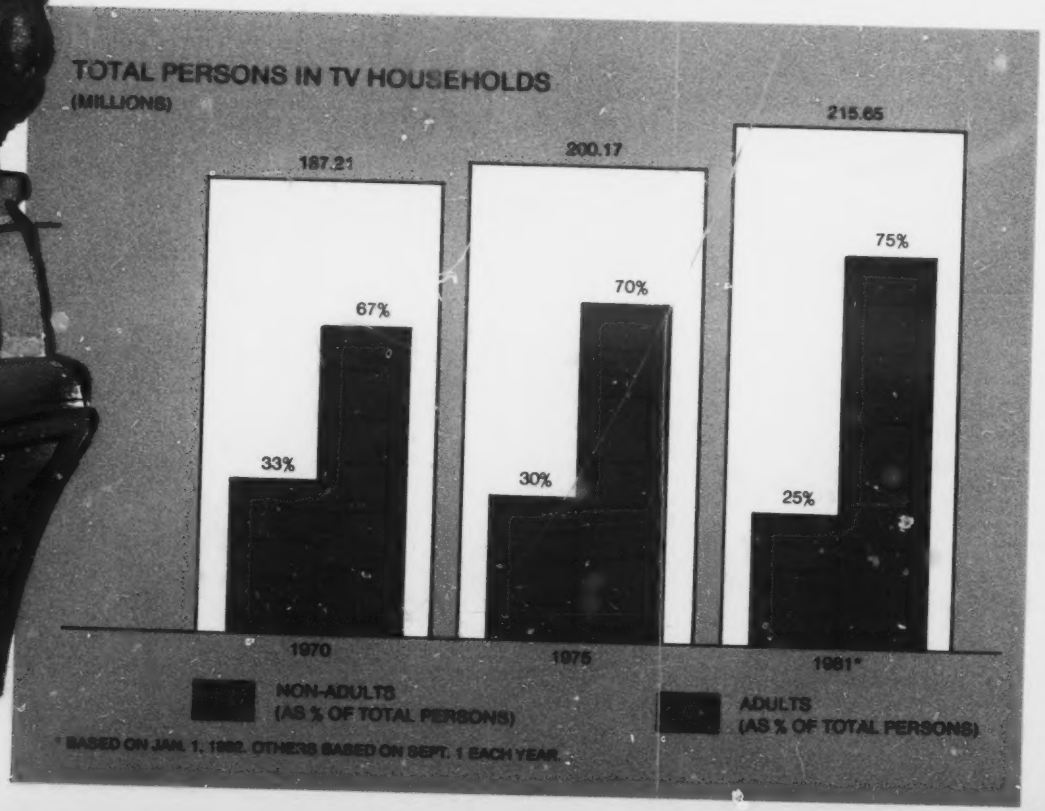

STATIONS AND CHANNELS RECEIVABLE
PER TV HOUSEHOLD
% SHARE OF TV HOUSEHOLDS
1-2 4 5 6 7 8 9 10+
1981
3 5 8 9 8 6 8 53 10-11 16% 12-14 24% 15+ 13% 100%
NO. OF CHANNELS
3 5 8 9 10 9 13 43 10-11 19% 12-14 17% 15+ 7% 100%
NO. OF STATIONS
1972
6 11 12 10 18 12 11 20 100%
NO. OF STATIONS
1961
22 19 14 19 12 6 4 4 100%
NO. OF STATIONS
SOURCE: NTI SAMPLE

98% of households own TV sets, 86% have color

Nielsen estimates 81.5 million U.S. Households owned at least one TV set as of January, 1982. More than half of these TV homes owned more than one set and 86% owned color TV sets.

TV households comprised of more adults and fewer non-adults

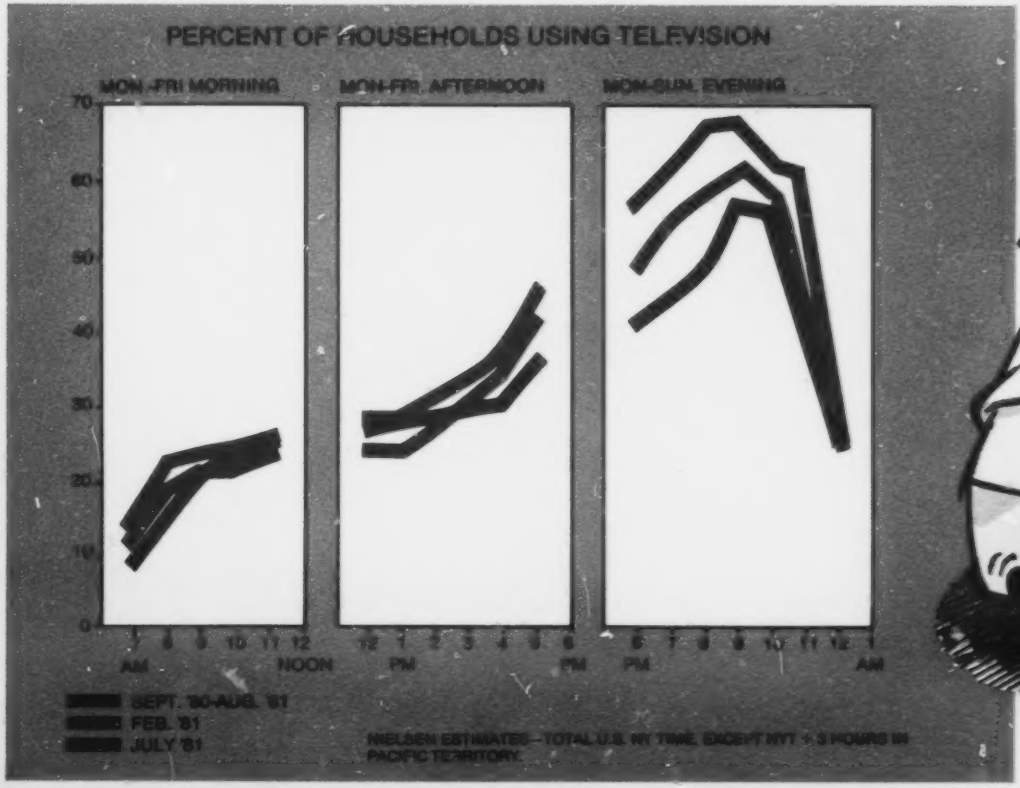
The total number of persons in TV households increased 15% since 1970 (215.7 million vs. 187.2 million). The share of the adult population (18 years and over) rose from 67% to 75%, whereas the non-adult population declined from 33% to 25%.



TV viewing levels highest during prime time

Television viewing levels increase throughout the day, reaching a peak between 8PM and 10PM. Thereafter, TV usage falls off rapidly as people go to bed.

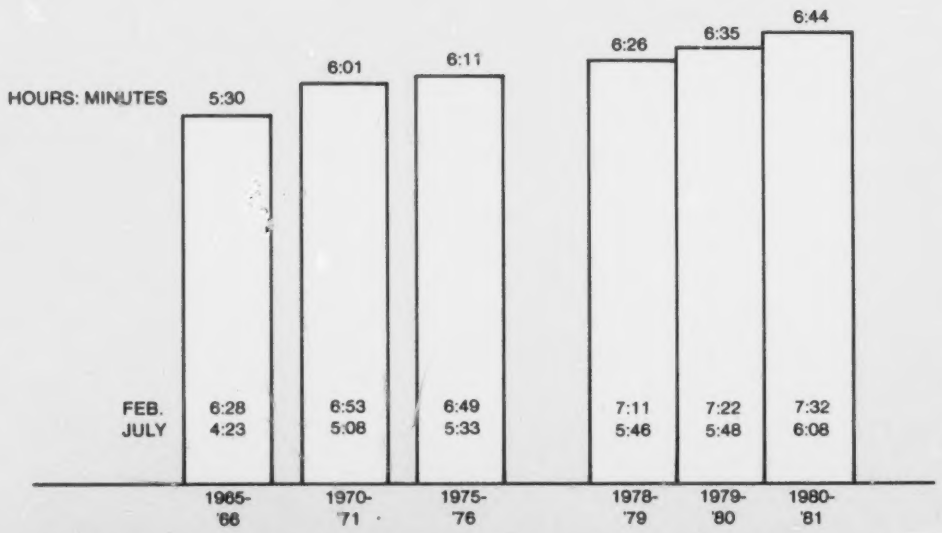
There are extreme variations in TV usage levels from winter to summer, particularly during late afternoon and evening hours. In contrast, there are only minor differences in early morning and late night.



Household television usage climbs to nearly 6 3/4 hours per day

TV households, on the average, viewed an estimated 6 hours and 44 minutes a day during the 1980-'81 TV season; the highest season average ever reported. This represented a 9-minute annual increase over the 1979-'80 TV season, with even larger increases reported in February (+10 minutes) and July (+20).

AVERAGE HOURS OF HOUSEHOLD TV USAGE PER DAY

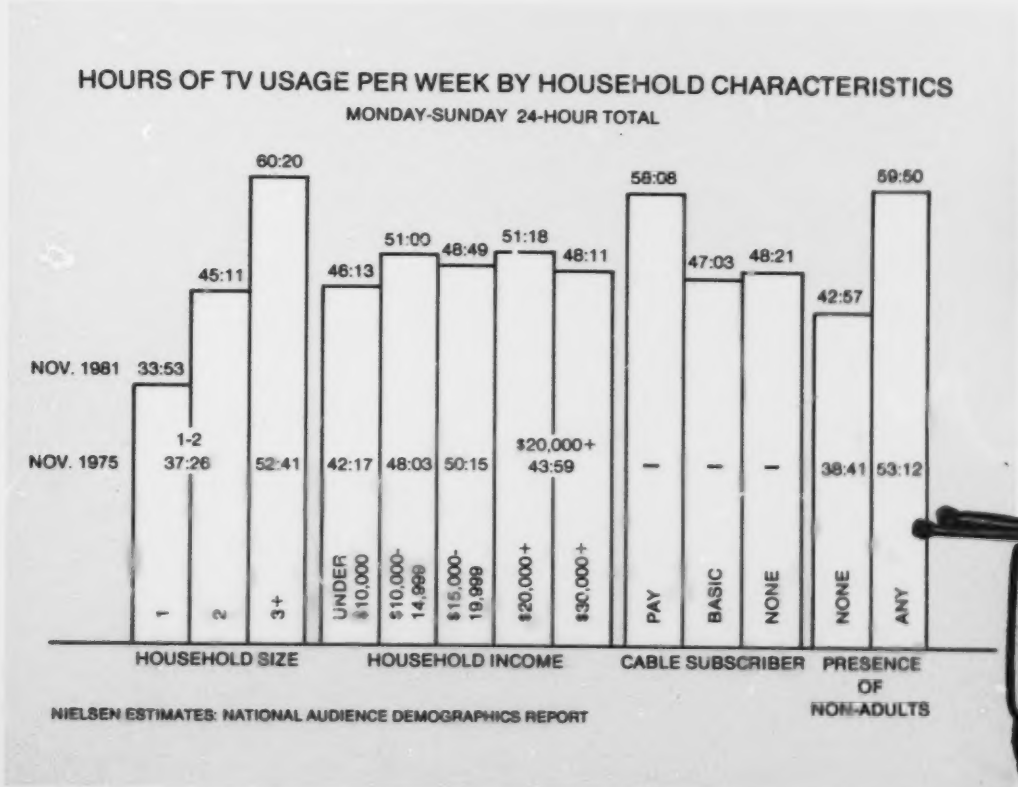


NIELSEN ESTIMATES BASED ON TOTAL U.S. HOUSEHOLDS
SEPT.-AUG. 48-WEEK AVERAGE EXCLUDING UNUSUAL DAYS.

TV usage greater among . . .

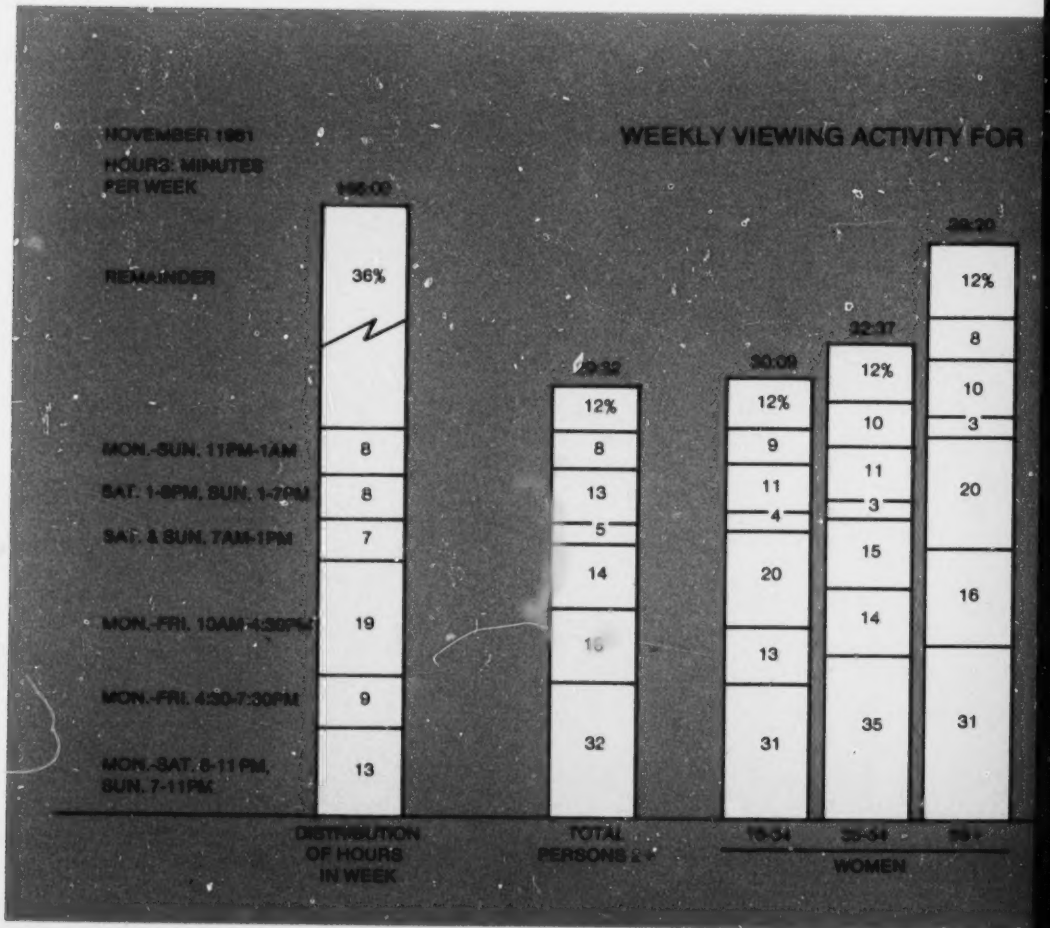
—Larger Households
—Pay Cable Households
—Households With Non-Adults

On the average, TV households viewed over 49 1/2 hours of television per week, however, certain homes viewed far more than that. Households with 3 or more persons, and those with non-adults, tuned in for about 60 hours a week. Pay Cable households viewed substantially more television than either those households with only Basic Cable service or no cable at all.

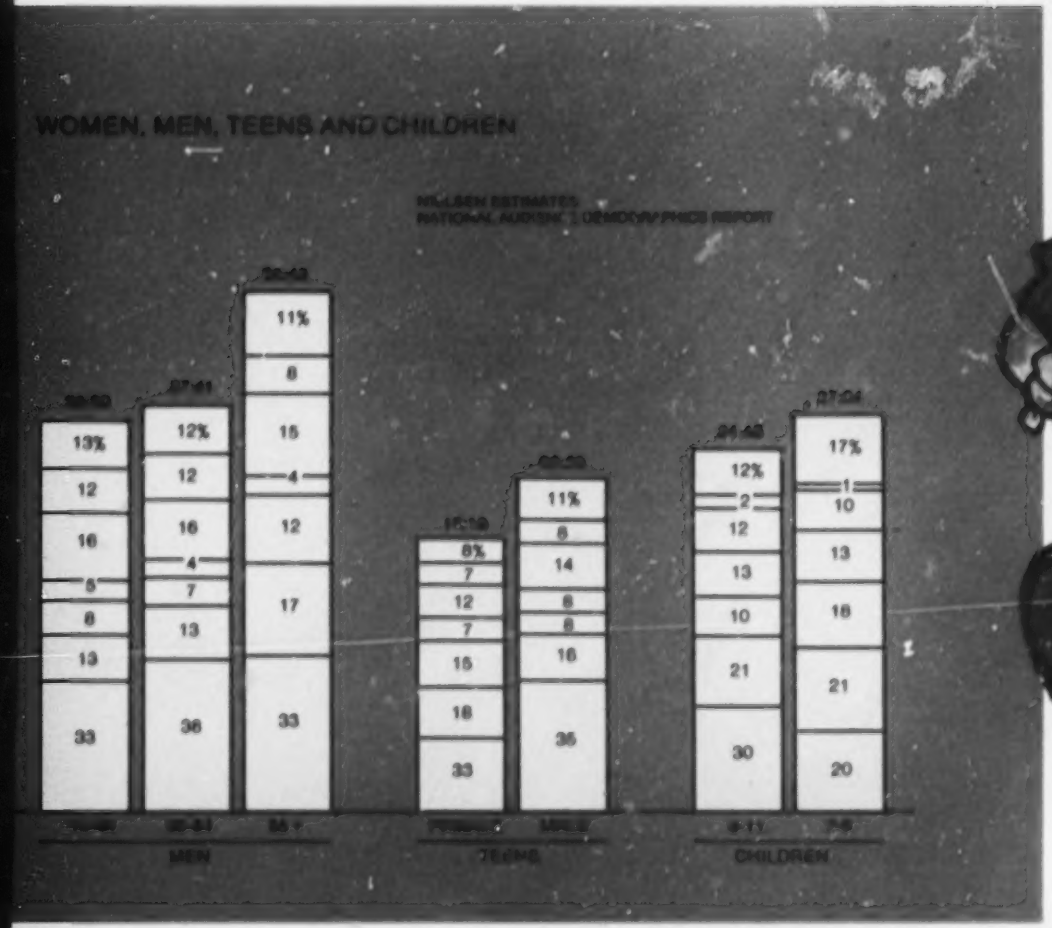


Older women view most; female teens least

In general, women view more television than men, older men and women view more than younger age groups and younger children view more than older children and teenagers.



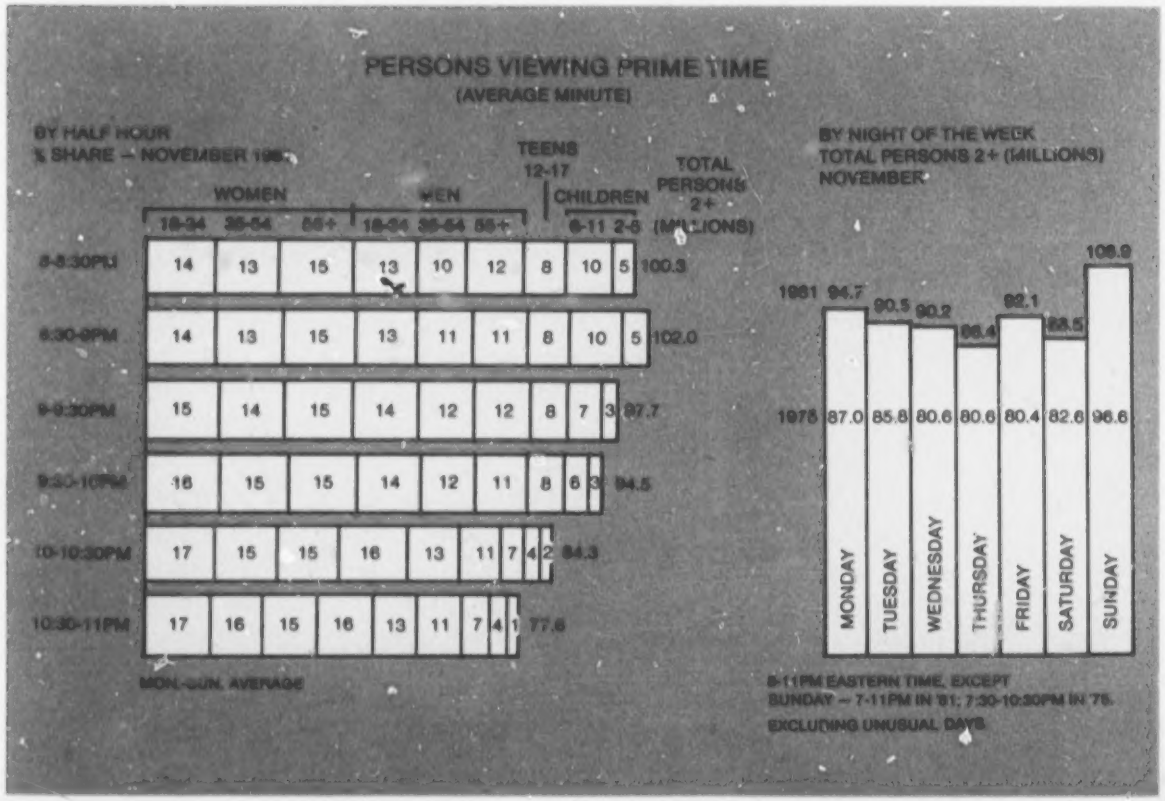
This viewing activity is distributed disproportionately throughout the day, reflecting each group's work, school or leisure time schedule. For example, prime time (Monday-Saturday, 8:00-11:00PM & Sunday 7:00-11:00PM) makes up only 13% of the week's total available hours, yet with the exception of children 1-5 years, this time period accounts for 30% or more of the people's viewing.



8:30-9:00PM time slot and Sunday night remain the most popular viewing times

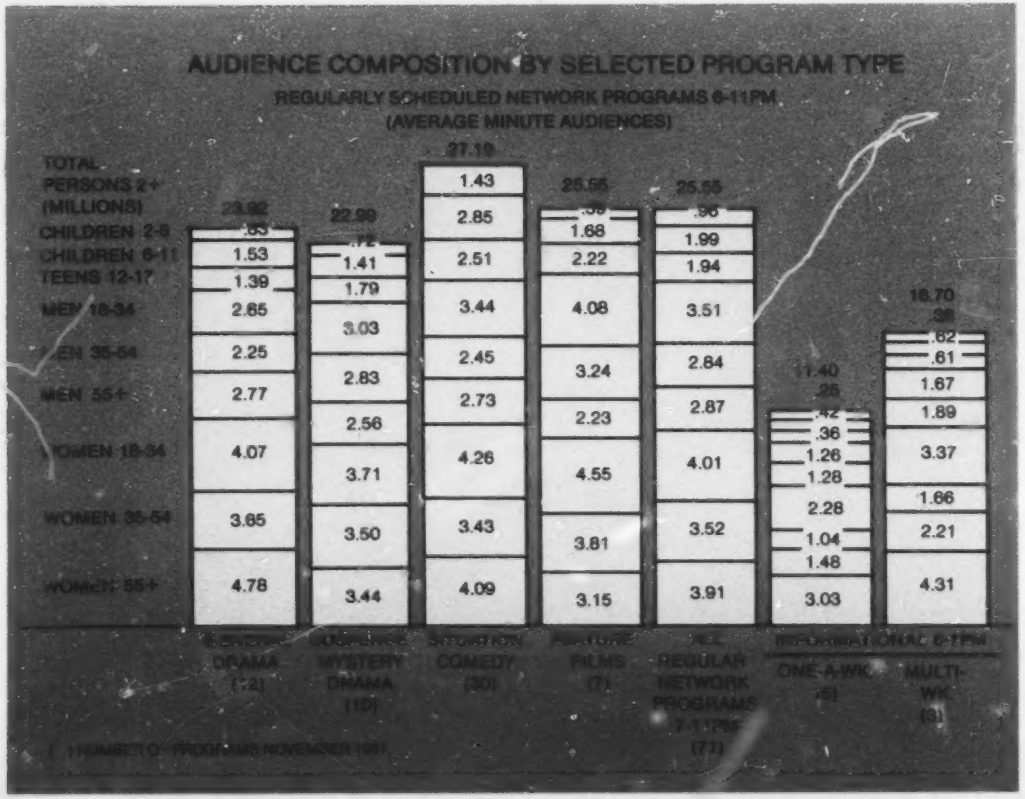
The 8:30 to 9:00PM time slot is the most-viewed (Mon.-Sun.) evening half-hour, and women account for the greatest share of viewing throughout the evening.

Year after year, Sunday evening continues to attract the greatest number of viewers. Monday was the second most popular November viewing night in both 1975 and 1981, but note Friday has moved from last to a strong 3rd place.


PERSONS VIEWING PRIME TIME
(AVERAGE MINUTE)
BY HALF HOUR
% SHARE — NOVEMBER 198
WOMEN
MEN
TEENS 12-17
CHILDREN
TOTAL PERSONS 2+ (MILLIONS)
18-34 35-54 55+
6-11 2-5
8-8:30PM 14 13 15 13 10 12 8 10 5 100.3
8:30-9PM 14 13 15 13 11 11 8 10 5 102.0
9-9:30PM 15 14 15 14 12 12 8 7 3 97.7
9:30-10PM 16 15 15 14 12 11 8 6 3 94.5
10-10:30PM 17 15 15 16 13 11 7 4 2 84.3
10:30-11PM 17 16 15 16 13 11 7 4 1 77.6
MON.-SUN. AVERAGE
BY NIGHT OF THE WEEK
TOTAL PERSONS 2+ (MILLIONS)
NOVEMBER
1981 94.7 90.5 90.2 86.4 92.1 88.5 109.9
1975 87.0 85.8 80.6 80.6 80.4 82.6 96.6
MONDAY
TUESDAY
WEDNESDAY
THURSDAY
FRIDAY
SATURDAY
SUNDAY
8-11PM EASTERN TIME, EXCEPT
SUNDAY — 7-11PM IN '81; 7:30-10:30PM IN '75.
EXCLUDING UNUSUAL DAYS

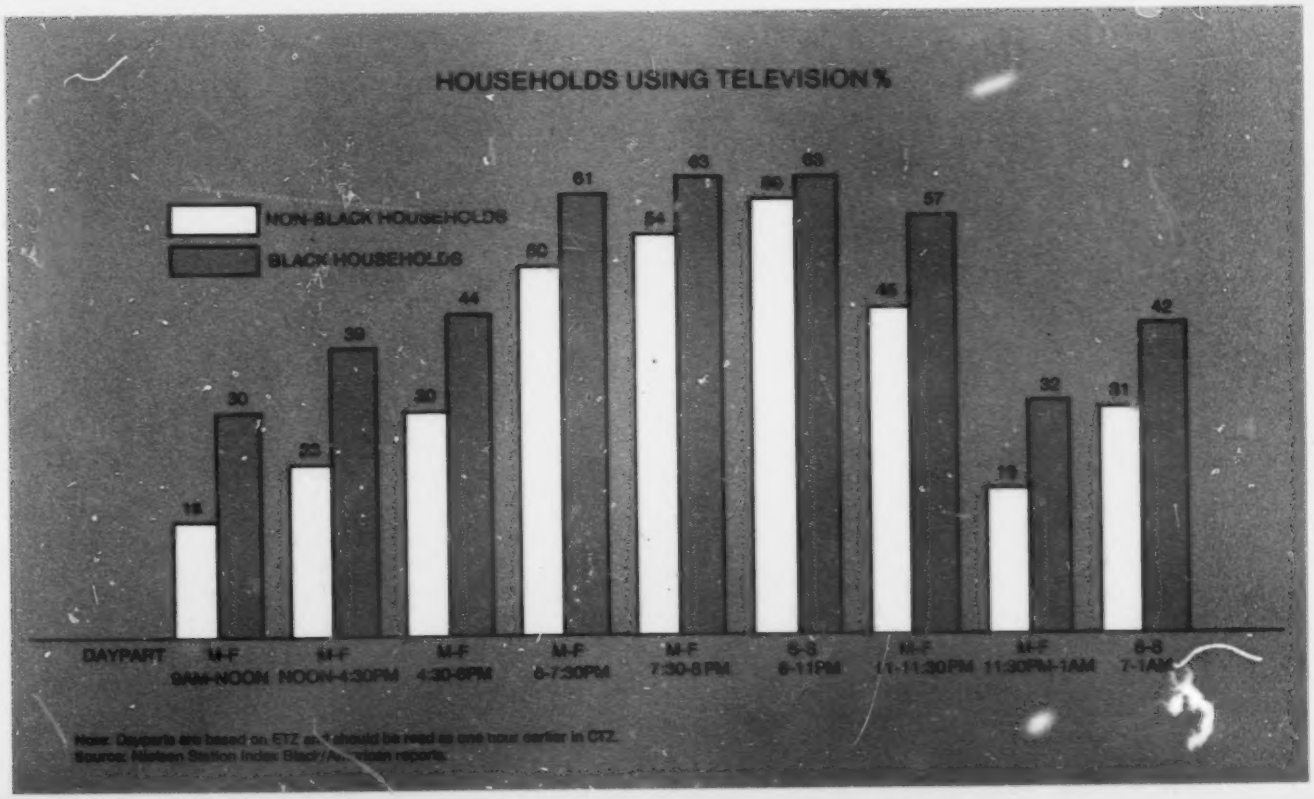
Situation Comedies most popular program type

Situation Comedies attracted the largest prime time overall audiences during November of 1981, recovering from a 2nd place finish behind General Drama in 1980. Sit-Coms were also the most popular type of programming for children and teens. As for adults 18-54, prime time audiences were highest for Feature Films, while adults 55+ preferred General Drama.



Black households view more television than Non-Black households

During the 1980-'81 season, Nielsen Station Index produced Black/American reports for thirteen markets: New York, Los Angeles, Chicago, Philadelphia, Detroit, Washington, D.C., Cleveland, Houston, St. Louis, Atlanta, Baltimore, Memphis and New Orleans. An average of TV usage across all markets showed that Black households viewed more television than Non-Black households. The largest differences occurred during the daytime, early and late fringe dayparts.



Programs featuring Black performers attract Black audiences

Although prime time showed the least difference in TV usage, programs featuring Black performers achieved higher ratings in Black households than in Non-Black households across all markets.

HOUSEHOLD RATINGS %

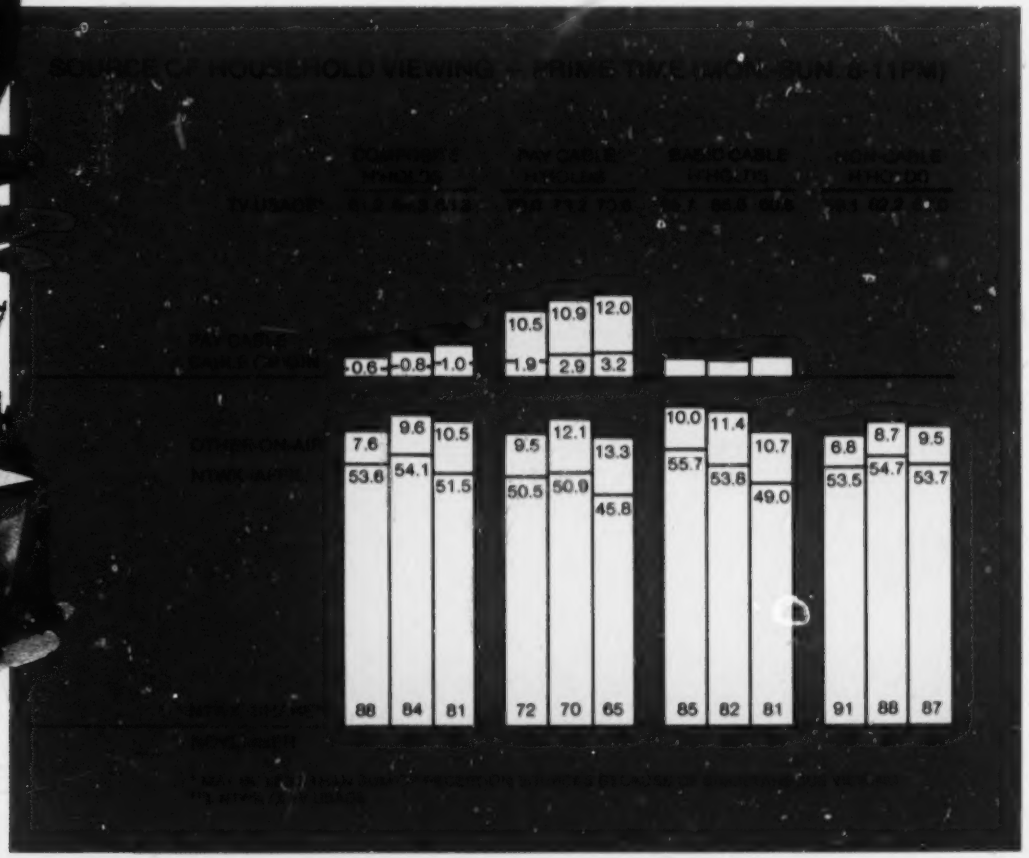
Market	Jeffersons			Benson		
	Black	Non-Black	Index	Black	Non-Black	Index
New York	35	17	206	23	12	192
Los Angeles	26	12	217	18	12	150
Chicago	26	16	163	26	16	163
Philadelphia	30	17	176	27	19	142
Detroit	32	17	188	20	15	133
Washington, D.C.	29	15	193	18	13	138
Cleveland	30	18	167	28	17	165
Houston	34	16	213	26	15	173
St. Louis	33	24	138	22	15	147
Atlanta	38	21	181	18	12	150
Baltimore	28	19	147	22	14	157
Memphis*	30	22	136	17	11	155
New Orleans	34	22	155	20	12	167
Average	32	18	178	22	14	157

Source: Nielsen Station Index Black/American reports, October/November, 1980.
*Memphis Black/American report, November 1980-February 1981

Pay Cable households view more TV than Basic Cable or Non-Cable

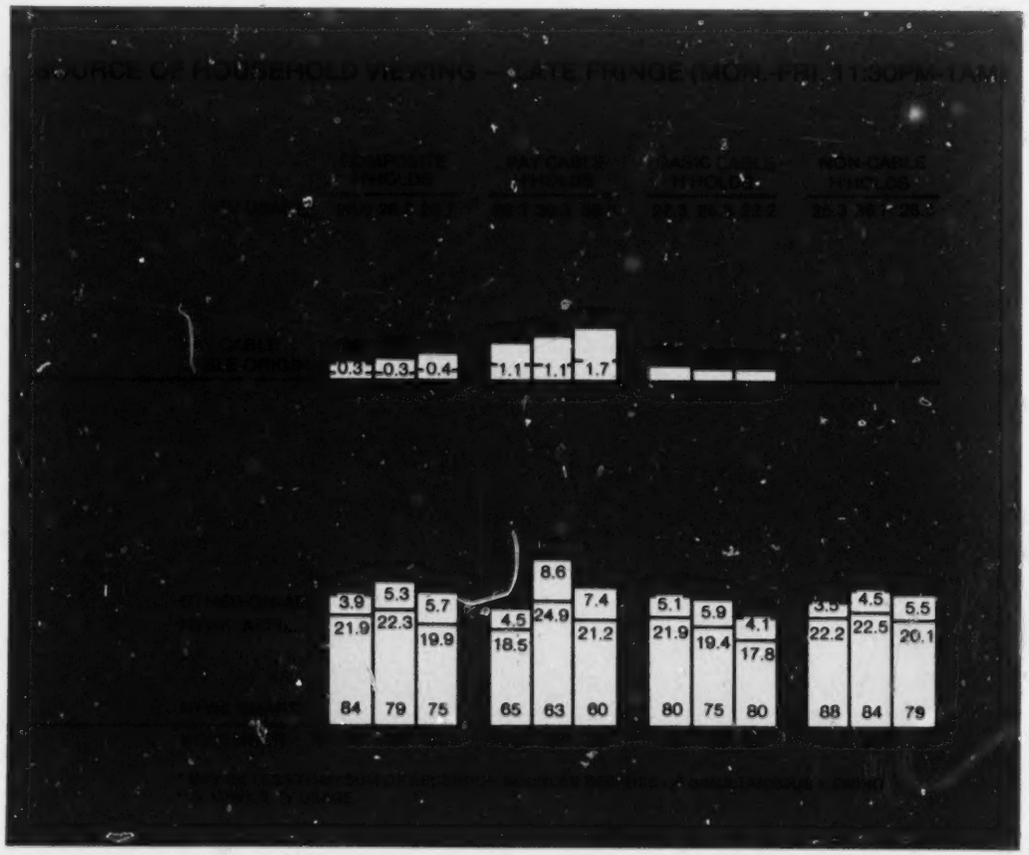
Pay Cable subscribers, in general, have tended to view more TV than either Non-Cable or Basic Cable households.

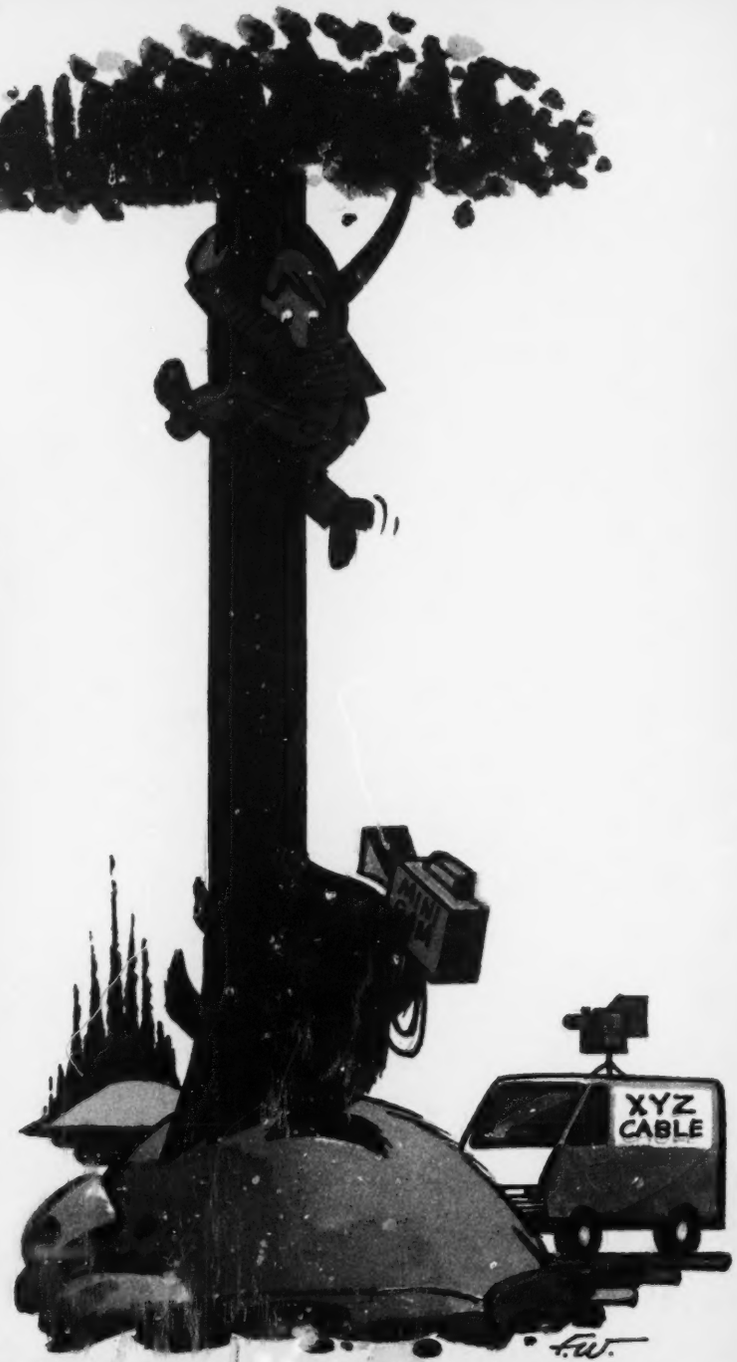
During both Prime Time and Late Night, a sizeable portion of the viewing of Pay Cable households was to the Pay Cable offerings, usually first run, uncut movies. Viewing during Late Night (M-F 11:30PM-1AM) to other-on-air stations (independents, public and subscription TV) is also significant



among Pay Cable subscribers as well as Basic Cable and Non-Cable households.

Generally, viewing to cable fare has increased over the last two years — no doubt due in part to more programming now being made available.





Top 15 syndicated programs

Currently there are well over 300 different commercial programs which independent distributing organizations offer for sale to individual local stations, including network affiliates, as well as independent stations. Many of these programs were, at one time, on network schedules, and many have never been seen on TV as other than "syndicated" programs. As a result, individual stations can supplement network offerings, provide diverse regional programs and offer national programs attuned to the preferences of the local area. The top 15 syndicated programs among different segments of our population are listed here. The programs are ranked by their average ratings (within their areas of coverage) as reported by Nielsen Station Index's Cassandra computerized reporting service.

NIELSEN/CASSANDRA RANKING OF SYNDICATED PROGRAMS

NOVEMBER 1981
AVERAGE HOUSEHOLD RATING (COMPUTED)

ALL DATA PRESENTED SUBJECT TO QUALIFICATIONS. PROGRAM AVERAGES SHOWN ARE WEIGHTED BY MARKET UNIVERSE.

WOMEN 18+

Program Name	# Mkts.	% Rating
Family Feud PM	113	11.2
PM Magazine	93	10.0
M*A*S*H	184	9.7
Hee Haw	176	7.6
Tic Tac Dough	109	7.4
Lawrence Welk Show	164	7.3
Dance Fever	119	6.3
Entertainment Tonight	106	6.3
You Asked For It	94	6.3
Joker's Wild	63	6.1
Barney Miller	100	5.9
Little House on the Prairie	42	5.8
Jeffersons	60	5.5
Solid Gold Original	177	5.3
Adventures of Pinocchio	9	5.2

TEENS 12-17

Program Name	# Mkts.	% Rating
Happy Days Again	154	12.1
Laverne & Shirley	97	10.8
M*A*S*H	184	9.8
Good Times	61	9.4
What's Happening?	34	9.3
Charlie's Angels	23	8.4
Welcome Back, Kotter	49	7.9
Little House on the Prairie	42	7.4
Jeffersons	60	7.1
Solid Gold Original	177	7.1
Brady Bunch	73	6.8
Dance Fever	119	6.5
Wonder Woman	45	6.4
Family Feud PM	113	6.2
Pink Panther	29	6.1

TOTAL U.S. HOUSEHOLDS

Program Name	# Mkts.	% Rating
M*A*S*H	184	13.9
Family Feud PM	113	13.2
PM Magazine	93	12.7
Hee Haw	176	9.7
Happy Days Again	154	8.8
Barney Miller	100	8.7
Tic Tac Dough	109	8.7
Laverne & Shirley	97	8.4
You Asked For It	94	8.4
Dance Fever	119	8.1
Entertainment Tonight	106	8.1
Lawrence Welk Show	164	8.1
Muppet Show	136	7.8
Little House on the Prairie	42	7.7
Jeffersons	60	7.5

MEN 18+

Program Name	# Mkts.	% Rating
M*A*S*H	184	9.4
PM Magazine	93	8.5
Family Feud PM	113	8.0
Hee Haw	176	7.3
You Asked For It	94	5.7
Barney Miller	100	5.6
Tic Tac Dough	109	5.0
Entertainment Tonight	106	4.9
Lawrence Welk Show	164	4.9
Dance Fever	119	4.8
Bart Starr	6	4.7
Vince Dooley	7	4.7
In Search Of . . .	59	4.4
Solid Gold Original	177	4.3
Kung Fu	37	4.2

CHILDREN 2-11

Program Name	# Mkts.	% Rating
Muppet Show	136	14.0
Scooby Doo	63	14.0
Pink Panther	29	12.3
Happy Days Again	154	11.8
Tom and Jerry	106	11.8
Laverne & Shirley	97	11.4
Brady Bunch	73	10.6
Daffy Duck/Porky Pig	12	9.9
Flintstones	53	9.5
Wonder Woman	45	9.5
Bugs Bunny	80	9.3
Adventures of Pinocchio	9	9.1
Mighty Mouse Show	11	9.0
Little House on the Prairie	42	8.9
Woody Woodpecker & Friends	49	8.9

Top 15 network programs

Many different programs rank in network television's Top 15 in the course of a year. Those shown here were the regular network programs that ranked at the top during Nielsen Television Index measurements, from October 26-November 23, 1981.

The size of a program's audience is but one of the number of ways to assess its worth or success. For example, many programs below the top 15 are successful because they appeal to a specific target audience that advertisers wish to reach.

TOP 15 REGULARLY SCHEDULED NETWORK PROGRAMS

NOVEMBER 1981
NIELSEN AVERAGE AUDIENCE ESTIMATES
2 OR MORE TELECASTS
(15 MINUTES OR LONGER)

WOMEN 18+

Program Name	Average Audience %
Dallas	24.5
60 Minutes	21.3
One Day at a Time	18.4
M*A*S*H	18.3
Alice	17.9
Three's Company	17.7
NBC Monday Night Movies	17.4
Magnum, P.I.	17.3
Too Close For Comfort	17.3
ABC Sunday Night Movie	17.2
Love Boat	16.9
Little House on the Prairie	16.5
Hart to Hart	16.5
Facts of Life	16.2
Jeffersons	16.2

TEENS 12-17

Program Name	Average Audience %
Three's Company	20.5
Laverne & Shirley	20.1
Happy Days	19.3
Too Close For Comfort	18.0
Greatest American Hero	16.7
ABC Sunday Night Movie	15.7
Facts of Life	14.8
Private Benjamin	14.6
Love Boat	13.6
M*A*S*H	13.5
CHIPs	13.4
Mork & Mindy	12.9
NBC Friday Night Movie	12.4
Magnum, P.I.	12.4
Diff'rent Strokes	12.3

TOTAL U.S. HOUSEHOLDS

Program Name	Average Audience %
60 Minutes	28.1
Dallas	27.7
Three's Company	24.0
M*A*S*H	23.4
Too Close For Comfort	22.7
One Day at a Time	22.4
ABC Sunday Night Movie	21.9
NFL Monday Night Football	21.8
Archie Bunker's Place	21.7
Dukes of Hazzard	21.3
Magnum, P.I.	21.2
Alice	21.0
Facts of Life	20.9
Happy Days	20.9
Love Boat	20.9

MEN 18+

Program Name	Average Audience %
60 Minutes	23.2
NFL Monday Night Football	21.4
CBS NFL Football Game 2	18.7
CBS NFL Football Game 1	18.4
ABC Sunday Night Movie	17.4
Dallas	16.4
NFL Football Game 2—NBC	16.2
Fall Guy	15.4
Archie Bunker's Place	15.0
M*A*S*H	14.6
Three's Company	14.6
One Day at a Time	14.3
That's Incredible	14.2
NBC Sunday Night Movie	13.9
Too Close For Comfort	13.8
NFL Football Game 1—NBC	13.8

CHILDREN 2-11

Program Name	Average Audience %
Dukes of Hazzard	28.2
Greatest American Hero	24.7
Walt Disney	24.4
Smurfs II	23.0
Incredible Hulk	22.9
Mork & Mindy	22.1
Laverne & Shirley	21.7
Here's Boomer	20.1
Happy Days	19.6
CHIPs	18.6
Smurfs I	18.1
Best of the West	17.4
Benson	17.4
Mr. Merlin	16.7
Kid Super Power I	16.1

'82 NIELSEN

Nielsen Media Research

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